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ABSTRACT

This paper discusses the new Individuals with Disabilities Education Act 1997 amendments that require states to develop guidelines for the participation of children with disabilities in alternate assessments who cannot participate in state and district-wide assessment programs. It describes and analyzes the efforts of 7 early starting states to define what they variously call assumptions, premises, rationale, beliefs, values, principles, parameters, or philosophies for alternate assessment. The foundations for the Kentucky, Maryland, and Michigan approaches are described first, because their work has influenced later work to a great extent. Next, foundation statements are included from Colorado, North Carolina, Tennessee, and West Virginia. The paper concludes by summarizing the effects that different orientations might have on alternate assessments. Results of the review indicate that Kentucky is the only state that fully includes all students within its statewide educational assessment and accountability system, and that state foundation statements are directing state efforts in the area of alternate assessment. The review also found that each assessment approach has its foundation in different philosophies that form the basis for the development of the alternate assessment. (Contains 10 references.) (CR)

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What Principles are Driving Development Of State Alternate Assessments?

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July 1998

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The 1997 Amendments to the Individuals with Disabilities Education Act (PL 105-17) require that each state:

> Develops guidelines for the participation of children with disabilities in alternate assessments for those children who cannot participate in State and district-wide assessment programs [(612) (17) (A) (i)]; and, develops and, beginning not later than July 1, 2000, conducts those alternate assessments [(612) (17) (A) (ii)].

The amendments also require teams developing Individualized Education Programs (IEPs) to address alternate assessments:

> If the IEP Team determines that the child will not participate in a particular State or district-wide assessment of student achievement (or part of such an assessment), a statement of why that assessment is not appropriate for the child [(614)(d)(1)(A)(v)(II)(aa)]; and
> how the child will be assessed [(614)(d)(I)(A)(v)(II)(bb)].

These provisions have states scrambling to establish guidelines for student participation in alternate assessments and to develop the assessments by July 2000. A number of conceptual pieces on alternate assessment were developed in 1996 and 1997 to assist states in their start-up (Mid-South RRC, 1996; Olsen, 1997; Thurlow, Olsen, Elliott, Ysseldyke, Erickson and Ahearn, 1996; Ysseldyke and Olsen, 1997; Ysseldyke, Olsen and Thurlow, 1997). One of the common threads that runs through these documents is the need for states to establish a solid philosophical base for alternate assessments before moving too far into the details of development.

If a state does not make decisions in advance, such as why they are developing an alternate assessment, the extent to which the alternate assessment should be aligned with the general curriculum, how results are to be used, and the intended long-term effects, it can lead to false starts and frustrating dead ends. Some of the issues that need to be addressed have been outlined by Ysseldyke, Olsen and Thurlow (1997). More recently, Olsen (1998) has extended that work, specifically pointing out the need to establish a firm philosophical foundation at the outset.

To date, a few states have started the journey of placing alternate assessment in the larger context of inclusive standards-based reform. The efforts of those states that have initiated this process can serve as a starting point for stakeholder teams in other states to establish foundations for alternate assessment. Therefore, the purpose of this paper is to describe and analyze efforts of seven early-starting states to define what they variously call assumptions, premises, rationale, beliefs, values, principles, parameters, or philosophy for alternate assessment. The foundations for the Kentucky, Maryland, and Michigan approaches are described first, because their work has influenced later work to a great extent. Next, foundation statements are included from Colorado, North Carolina, Tennessee, and West Virginia. The author concludes by summarizing the effects that different orientations might have on alternate assessments.

Foundations

Kentucky

In 1990, Kentucky's Education Reform Act triggered action by a state task force intent on ensuring inclusiveness in the content standards, performance standards, and inclusive assessments and accountability practices. An "Effectiveness Evaluation Task Force" developed seven guiding statements for their work:

- Expectations for all students in Kentucky should be high, regardless of the existence of any disability;
- The goals for an educated student in Kentucky must be applicable to all students, regardless of disability;

- Special education programs must be an extension and adaptation of general education programs rather than an alternative or separate system;

- Special education's task is to enable each individual to attain outcomes necessary for meaningful participation in society including domestic, vocational, work, community, and social environments by preventing handicaps from becoming disabilities, compensating for disabilities, and limiting the individual's inabilities. Therefore we must discover what special education accommodations are necessary to enable a student to attain critical outcomes, to become a lifelong learner, and to be a full participant in society;

- Individualized Education Programs (IEPs) must reflect the goals and valued outcomes for schools of the Commonwealth while integrating critical needs based on the uniqueness of the individual;

- Having effective special education programs requires having data available for decision making at student, school, district, and state levels; and

- Involvement of stakeholders in the development of the state systems increases the chances that those systems will meet needs.

The Kentucky task force used this foundation to influence the state assessment system. They were so effective that the request for a proposal issued for the state assessment system included the following requirements:

- Although the focus for students with disabilities and of diversity is on recognition of the individual, the need for a statewide system should include...

- Individually adapted assessment when assessment data will be used for decisions about individual students;

- All students with disabilities in their chronological age appropriate sampling frame;

- A strategy for sampling representative numbers of students in hospitals, homes, and other separate facilities;

- A sufficient sampling of students with disabilities to ensure inclusion for accountability and to provide information for decision making about subpopulations;

- Adapting all items for hearing and vision impairments, (e.g., all items on audio tapes, all print materials in large type and Braille, all items reflective of a linguistic structure that do not overly bias the performance of students with hearing impairments, etc.); and

- Writing standard input-output adaptations for each item for students who have similar learning characteristics.
- It is difficult to develop tasks and scoring appropriate for all children in the continuum (from severe disabilities to gifted), yet to not do so means excluding students. Therefore, the assessment system must...

- Allow for a broad range of behaviors in scoring in order to minimize exclusions;

- Provide substitute tasks for students with moderate, severe, and profound mental disabilities to assess the same general valued outcomes and the adaptations in scoring;

- Reflect the input and output adaptations in scoring; and

- Minimize timed items and consider extensions of time to allow more time for students with disabilities that affect input, processing, and output.

- It is difficult to develop tasks appropriate for diverse students [who differ in terms of] ethnicity, race, SES, language, population density and living experiences, religion, and other cultural aspects. Therefore, the assessment system should...

- Creatively expand the base of tasks to be inclusive of various cultures and experiences;

- Use multiple options for settings and materials to increase relevance; and

- Produce written and oral translations in prevalent language for tasks that are not designed to assess written English.

Because of the strong focus on including all students, development and pilot testing proceeded as if every student could take the same measures. However, after approximately two years into implementation, it became apparent that the measures were inappropriate for a small number of students. Therefore, a "Disability and Diversity Advisory Committee" recommended development of an alternate measure. Another small committee was formed, consisting of regular educators, teachers of students with severe cognitive disabilities, state assessment personnel, and the assessment contractor. This group, led by personnel on a Systems Change Project at the University of Kentucky, developed the following rationale and philosophy for an Alternate Portfolio:

Rationale

- Ensures that children with significant challenges will be represented in the accountability system;

- Supports an activity that encourages change and growth over a period of time;

- Provides other ways for the teacher to look at the effect of programming on individual students and to make changes in instruction;

- Explores a range of critical functioning across life domain areas;

- Encourages student choice and decision making in learning as well as evaluation of their own work;

- Merges instructional and assessment activities; and

- Builds in support for meaningful participation.

Philosophy

- Supports a method of evaluation that allows students to demonstrate strengths rather than weaknesses;

- Values learning styles and diverse abilities;

- Encourages the student to engage in learning that has meaning for him/her;

- Provides multiple dimensions for measuring significant progress; and

- Promotes the vision of enhancing capacities and integrated life opportunities.

The efforts of this committee resulted in the alternate portfolio being consistently implemented for six years as an integral part of the state accountability system, with the focus on a limited population (less than 1%). The philosophy driving the Kentucky Alternate Portfolio was one of full inclusion, consistent with the approach taken in the Systems Change Project from which it evolved. Thus, the Alternate Portfolio was based on standards that interpret and extend a subset of the general education standards rather than on a separate functional or life skills curriculum. However, the system still attends to the major life domains of personal management, recreation and leisure, and vocational.

It is significant that scoring of the Alternate Portfolio includes, in addition to student performance and range of outcomes addressed, criteria that focus on inclusive practices (i.e., use of natural supports, development of peer interactions/friendships, use of multiple settings, and use of appropriate technology and adaptive or assistive devices).

The criteria for identifying students eligible for the Alternate Portfolio are very stringent. The Alternate Portfolio is considered one piece of the overall assessment system, is funded through the same sources as the regular large-scale assessment, and is supervised by the state assessment unit.

Maryland

Development of the Independence Mastery Assessment Program (IMAP) in Maryland took an entirely different path than that of Kentucky. Three fundamental premises guide Maryland's general approach to large-scale assessment and accountability:

- All children can learn;
- All children have the right to attend schools in which they can progress and learn; and
- All children shall have a real opportunity to learn equally rigorous content.

Large-scale assessment is administered through the Maryland School Performance Assessment Program (MSPAP). To ensure a focus on including all students, Maryland obtained funding to develop an alternate approach specifically targeted to students with severe cognitive disabilities whom otherwise would not be able to participate in MSPAP, even with accommodations. With the help of the University of Maryland and a state task force, the state developed the IMAP, a system involving performance tasks, a portfolio, and a parent survey. As stated in a recent summary about IMAP (Haigh, 1998):

> The philosophical assumption of IMAP is to create an instrument developed by teachers and parents that identifies key elements that are critical for this population of students. These elements reflect what these two groups believe students should know and be able to do by the time they leave school. The outcomes and indicators of the IMAP would provide the foundation and direction for loca curricular matches and development in alignment with the general education outcomes. (pp. 18-19)

The Maryland approach primarily focuses on the post school needs of students with severe cognitive disabilities. Therefore, unlike the Kentucky standards, the Maryland standards were defined specifically for the population being assessed and were intended to be comprehensive (i.e., represent the full range of content and enabling skills needed). The content areas are personal management, community, career and vocational, and recreation and leisure. The enabling skill areas are communication, decision making, behavior, and academic.

While IMAP includes support criteria for the scoring of performance, the concept of support is more loosely defined than that of Kentucky and certainly less dependent on an inclusive service delivery system. The IMAP is now being pilot tested throughout the state, and approximately 3 to 5% of the special education population is using the alternate assessment in those local educational agencies using

the IMAP. Thus far, the development has been funded and supervised through the special education unit of the Maryland Department of Education.

Michigan

In 1987, the Michigan Office of Special Education Services contracted with Disability Research Systems, Inc. to design performance expectations and appropriate assessment tools for monitoring student progress on educational outcomes of significance to all students with disabilities. The rationale for the effort was articulated in an article by William Frey, director of the project (Frey, 1991). Although there is no convenient list of principles, the rationale is clear:

- The task of special education is to limit handicaps, to compensate for the disability or limit the inability, to enable an individual to access the same knowledge as his nonhandicapped peers;
- Student performance data should focus on improving communication among school personnel and parents about the significant educational needs of students with disabilities, improving understanding and monitoring of curriculum needs, and improving appraisals of student progress; and
- Special education must attempt to discover what special educational accommodations are necessary for students with an impairment to learn and achieve in education;
- Assessing the unique skills is essential to holding educators accountable for ensuring that special education services have focused on student needs;
- A successful accountability system should affect individualized education plans of students, annual education reports filed by school districts, and the focus of school improvement committee activities.

Originally called the Outcome Indicator Project for Special Education, the focus was on unique lists of outcomes for each category of disability. By 1996, these documents evolved into material entitled Addressing Unique Educational Needs of Individuals with Disabilities (AUEN) (American Institutes for Research, 1996). The 1996 manual contains four levels of achievement:

- Level 4 - Performance Expectations for achieving full independence in major life roles. These Performance Expectations address the educational needs of students with physical, emotional, or learning disabilities who function in the normal range of intelligence;
- Level 3 - Performance Expectations for achieving functional dependence in major life roles. These Performance Expectations address the educational needs of students with mild mental impairment or those who function as if they have such an impairment;
- Level 2 - Performance Expectations for achieving supported independence in major life roles. These Performance Expectations address the educational needs of students with moderate mental impairment who are expected to require ongoing support in adulthood; and
- Level 1 - Performance Expectations for achieving participation in major life roles. These Performance Expectations address the educational needs of students with severe or profound mental impairment who are expected to require extensive ongoing support in adulthood.

Michigan has a three-year plan to refine assessment tools, including standardizing teacher activities, aligning curricula and ensuring reliable and valid measurement, for two levels: Supported Independence and Participation levels as its alternate assessment. In early 1999, Michigan will expand its development effort to include the levels of Full Independence and Functional Dependence

The Michigan alternate assessment approach is evolving from a philosophy that focuses on accountability for the unique educational needs of students with disabilities that lead to adult life roles. Therefore, the

Michigan foundation differs from Kentucky's, which focuses on a subset of the standards for all students, and Maryland's, which focuses on a broad set of post school outcomes for students with disabilities.

Summary and Implications for Other States

As of July 1998, Kentucky, Maryland, and Michigan were the leading systems attempting to implement alternate assessment on a large scale. It is clear they have taken three completely different paths, and it would appear those paths diverge because their basic philosophies differ. States just beginning development might review these foundations when designing their own systems.

At least four other states have articulated philosophies and have begun development of their systems. All are being developed with the involvement of both regular and special educators. A statement from each state follows, along with a brief introduction for each taken from summaries of meetings and other sources.

Colorado

An Expanded Standards Task Force was brought together in the spring of 1997 to begin investigating the creation of an inclusive accountability system within standards-based education. This committee included 25 representatives from districts across the state, including general and special education building and district administrators, general and special education teachers across all grade levels, advocates, parents of students with disabilities, and State Department of Education personnel. Together with other subcommittees working on standards application for students with disabilities, the Expanded Standards Task Force committed to developing a process that ensured the inclusion of students with the most significantly diverse learning needs.

These committee members developed a set of Guiding Principles under which each task force operates. These principles are based on the foundation that:

- Colorado must have a system of accountability for student performance that includes ALLstudents;
- Accountability for results resides at the state, district, building, classroom and individual student levels;
- ALL students can be challenged to higher levels of achievement;
- ALL students must have the opportunity to access the general curriculum;
- ALL students will participate in general standards and the state assessment process. Individual student needs will drive the decision on how each student will participate;
- ALL students have the right to instruction that meets their unique needs. This involves providing appropriate opportunities for success and intentional instruction in critical access skills;
- Standards, assessments, curriculum, and instruction must be aligned for all students;
- For students with Individual Educational Plans (IEPs), any given standards may have benchmarks that may be expanded and/or modified;
- Student performance data should guide policy; and
- Transition planning: Practice with transition skills and other critical access skills should occur with practice in content skills.

The task force continues to meet and currently is exploring a two-level approach to alternate assessment. For Reading, Writing, Math and Science, they will expand or extend the general education standards to encompass more functional skills. They will attempt to parallel the general assessment in grades 3, 4, 5, 7 and 10 with some common measures that assess these extended standards using a performance-based approach. In addition, local school districts will be provided guidance on developing "a body of evidence" for individual students related to what they call "access" skills. At the present time, the only criteria for inclusion in alternate assessment are the current criteria for exclusion from the general assessment. This has resulted in approximately 4% of the total number of students being excluded.

North Carolina

North Carolina formed a Steering Committee of stakeholders and asked them to generate statements for the alternate assessments in the state. A core team used that input to generate the following "Beliefs and Assumptions that Drive Alternate Assessments in North Carolina":

- All children have value, can learn and are expected to be full participants in the school experience;
- School personnel, parents, local and state policy makers and the students themselves are responsible for ensuring this full participation;
- The North Carolina Standard Course of Study is the foundation for all students, including students with unique learning needs;
- The unique learning needs of students with disabilities require fully inclusive accountability systems with sufficient instructional and assessment supports;
- Accountability systems must include alternate assessments to measure the progress of those few students whose needs focus on functional and life skills as extensions of the standard course of study;
- Alternate assessment scoring criteria must reflect both student performance and program supports;
- Alternate assessment measurement and reporting must be defensible in terms of feasibility, validity, reliability and comparability;
- Results of alternate assessments must be used to improve planning, instruction and learning for each individual student;
- The alternate assessment must be an integral part of the overall state assessment system in terms of policies, written materials, training, reporting and accountability indices;
- Effective alternate assessment includes:
- Clear criteria for determining eligibility;
- Ongoing staff development and parent and community education;
- Broad stakeholder involvement throughout development, implementation, evaluation, and refinement; and
- Clear, useful reporting of results.

The Steering Committee and Core team continue to struggle with matching the alternate assessment to the large-scale assessment, which occurs at every grade, 3-8, involving end-of-course testing at the secondary level which is based on a quite narrowly defined course of study. North Carolina has elected to use portfolios and has defined four competency domains in which student work should be reflected:

- Communication;
- Personal and home management;
- Career/vocational; and

- Community.

Given this result, the team appears to be reconsidering its third belief assumption (i.e., that the North Carolina Course of Study is the foundation for all students).

The statement that alternate assessment must be an integral part of the overall state assessment is evidenced in the leadership of the state team, co-chaired by persons from the Exceptional Children and Accountability units. North Carolina's beliefs and assumptions are reflected in the North Carolina Portfolio Assessment for Students with Disabilities: Pilot Site Guide (1998), which refers to "those few students whose needs focus on functional and life skills" (p. 7). Their criteria for inclusion in the alternate assessment are not as detailed as those in Kentucky, West Virginia, or Tennessee and focus on a disability "severe enough to require removal from the North Carolina Standard Course of Study" (North Carolina Portfolio, 1998, p. 9).

West Virginia

State staff from the special education and assessment units in West Virginia met to develop plans for alternate assessment. As an initial step, they developed "Beliefs That Form the Foundation for Alternate Assessment in West Virginia":

- All children can learn;
- Accountability at school, county and state levels must be based on educational results of all students;
- Results of the state assessment program must be used to improve planning, instruction, and learning for each individual student;
- An alternate assessment is appropriate for those few students whose education is focused on functional and life skills;
- Clearly defined criteria must be used to determine those students who participate in the alternate assessment;
- The alternate assessment must measure individual students' progress in the attainment of functional skills based on the framework of state-adopted Instructional Goals and Objectives;
- Measurement and reporting must be defensible in terms of feasibility, validity, reliability and comparability; and
- Assessment results must be provided in a meaningful way that is easily communicated, understood by all and useful for a variety of purposes.

Using these statements as a stepping-off point, they developed specific criteria for eligibility and developed a curriculum framework to serve as a basis for the alternate assessment. The West Virginia philosophy focuses on "attainment of functional skills based on the framework of state-adopted Instructional Goals and Objectives." Therefore, a task force of teachers and curriculum specialists was formed to extend the state's content standards Instructional Goals and Objectives for all students. They produced a framework entitled "West Virginia's Alternate Assessment Framework: Linking Instructional Goals and Objectives With Adaptive Skills." This framework indexes a subset of the general Instructional Goals and Objectives to the ten adaptive skill areas reflected in the American Association for Mental Retardation definition of mental impairment:

- Self care;
- Communication;
- Home living;

- Social skills;
- Community use;
- Self direction;
- Health/safety;
- Functional academics;
- Leisure; and
- Work.

West Virginia's plans involve funding local school districts to develop pilots for alternate assessment and evaluating them before selecting a statewide approach. As in North Carolina, leadership in West Virginia is shared between the Office of Special Education Programs and the Office of Assessment. Unlike North Carolina, no explicit assumption statement exists that provides impetus to that shared leadership. West Virginia states that an "alternate assessment is appropriate for those few students whose education is focused on functional and life skills." The West Virginia criteria for identifying students for the alternate assessment parallel those for Kentucky and might be expected to result in similar inclusion rates (i.e., <1%).

Tennessee

A Tennessee Core Team of special education, assessment, and curriculum personnel from state and local education agencies was formed in Spring 1998 to plan for that state's alternate assessment. The initial meeting of the team produced the following "Foundational Beliefs for TCAP Alt":

- The special education curriculum must be an extension and adaptation of the general education curriculum;

- Assessment and accountability should include every child;

- Expectations for each student's learning must be high regardless of learning differences;

- There is a small number of students for whom the general curriculum and/or the TCAP are inappropriate, even with extensive
- modifications/accommodations; and these students can be consistently identified; and

- Therefore, an alternate statewide assessment and accountability process is needed that:
- Mirrors the general assessment in terms of purposes and uses;
- Produces information useful for planning and instruction at system, school, and student levels;
- Provides valid and reliable data to document program effects; and
- Is part of the overall accountability system.

The statement regarding "a small number of students for whom the curriculum and/or the TCAP are inappropriate" led the team to develop fairly restrictive criteria for inclusion in the alternate assessment. These criteria are similar to those in Kentucky and West Virginia and might be expected to result in less than 2% of the total number of students being included in the alternate assessment. The statement that the "special education curriculum must be an extension or adaptation of the general education curriculum" has led to the development of a draft curriculum framework that will serve as a basis for the alternate assessment. The framework consists of a subset of the goals and standards for all students, with modifications to address more functional skill areas.

Leadership in the area of alternate assessment is still emerging in Tennessee; however, the stakeholders' team and the framework committee represent both general and special education. Decisions about the assessment process will be made later this summer and fall.

Relating Philosophy and Actions

Currently, Kentucky is the only state that fully includes all students within its statewide educational assessment and accountability system. From the beginning, Kentucky's intent was to assess all students while providing an alternative option for those students for whom the general large-scale measures are inappropriate. Now IDEA '97 requires all states to do the same.

It is clear from the actions of these seven states that their foundational statements are, in fact, directing their efforts in the area of alternate assessment. Each assessment approach has its foundation in differing philosophies that form the basis for the development of the alternate assessment. The differences are seen in at least three arenas. First, the standards upon which the alternate assessment are based are either a subset of, separate from, or an extension of the goals for all students. For example, Kentucky, Colorado, Tennessee, and West Virginia purport that their frameworks reflect the state's goals for all students. On the other hand, Maryland and Michigan provide specific rationale for different standards. North Carolina's documents indicate that the State Course of Study is the foundation for all students but their initial work focuses on some rather functional domains.

Second, many statements were made to define the population of students to be included in alternate assessments. The differences in the states' eligibility criteria reflect some of these statements. The criteria proposed in Maryland and North Carolina relate specifically to the extent to which a student is pursuing a program leading to a diploma. The criteria in the other states are more complex and usually more restrictive. They deal with type of instruction needed, the settings in which instruction should be provided, and conditions that are not legitimate bases for a decision (e.g., attendance, disruptive behavior, poor teaching, low expectations).

Finally, the philosophy statements might reflect the extent to which the development process is driven by special educators or represents a shared role of those responsible for special education and general assessment. West Virginia has perhaps the strongest belief statement about alternate assessment being part of the overall assessment system. They also have a strong special education—assessment partnership. Similarly, Kentucky's statements about a fully inclusive assessment system are demonstrated through an assessment system that is funded and operated entirely by the state assessment unit with consultation from the exceptional children's unit.

Conversely, North Carolina's statements contain no such reference; yet that state also has strong ownership from the assessment unit. Perhaps a strong philosophical statement regarding links to general assessment would increase the probability of shared ownership, but lack of such a statement does not necessarily mean that such a partnership could not exist.

Colorado, North Carolina, Tennessee, West Virginia, Kentucky, Michigan, and Maryland reflect differing philosophies. Each state and its respective stakeholders are working to develop accountability systems that ensure the inclusion of students with the most substantially diverse learning needs. These states continue to grapple with such issues as aligning the alternate assessment with the large-scale assessment, establishing guidelines and criteria for student participation, and determining overall leadership and responsibility.

Establishing a solid philosophical foundation is crucial as states begin developing alternate assessments. The stakeholder teams responsible for planning must ask several crucial questions as they begin. Among the most crucial is, "What do we believe?" The answers will dictate the direction of the alternate assessment.

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